3. Accessing the SS/SSI Reports via the TASS Online System

HUD provides the SS/SSI benefit information for tenants scheduled for re-certification four (4) months before the tenants' annual re-certification dates. The reports are made available to the program administrators of HUD's rental assistance programs via the TASS online system.

This Chapter provides procedures for program administrators to: (1) access the TASS online system, (2) view, save and print the reports and (3) distribute the reports to end users.

A. Introduction

Program administrators can access SS/SSI Benefit History, Income Discrepancy, Error and No SS/SSI Benefit Reports through a secure Internet facility, the TASS online system. Security for the electronic SS/SSI data is critical. Accordingly, HUD has developed extensive measures to protect the data from unauthorized access. Some key security features affecting user access to the TASS online system include but are not limited to the following:

- Users must enter a User ID and password. This procedure ensures that program administrators will have access only to the SS/SSI benefit information for the tenants under their jurisdiction.
- Data encryption occurs that is transparent to the user. This prevents unauthorized access to the data while in transmission.

The extensive security measures provide a high degree of protection against unauthorized access. In the event that an authorized user learns of any security violations, they should immediately report such violations to the REAC Technical Assistance Center at 1-888-245-4860.

Program administrators must initiate security measures that will supplement the HUD-provided security measures. These measures include, but are not limited to the following:

- Restricting access to SS and SSI data only to persons whose duties or responsibilities require such access;
- Securing electronic and printed documents containing private SS/SSI benefit information from unauthorized disclosure, whether intentional or unintentional;
- Deleting files of SS and SSI data stored on local computer hard drives when no longer needed;
- Destroying, by burning or shredding, all hard copies of documents containing private SS/SSI benefit information when no longer needed;
- Providing training, at least annually, to keep staff current on issues related to security awareness, privacy protection, and compliance with State privacy laws; and
- Investigating reports of potential security violations and taking prompt corrective actions as appropriate

B. Obtaining Internet Access

Program administrators will be responsible for obtaining Internet access through an Internet Service Provider. Program administrators will access the TASS online system using a Web Browser. The following browsers are supported:

- Netscape, versions 3.0 or higher
- Internet Explorer, version 4.0 or higher

Other versions of these browsers or other browsers may not be compatible with the system software. Program administrators should consult their Internet Service Provider with questions on Web browser compatibility.

C. Access Role Types

There are two types of users in HUD Secure Systems: Coordinators and Users. The two types are described below.

C-1 Coordinator Role

A coordinator is a system administrator who acts on behalf of one or more organizations identified by HUD as trusted business partners (e.g., owning entities and public housing authorities). The coordinator is responsible for controlling access to HUD's secure systems for the organization(s) they represent including:

- Retrieving a User ID and providing it to the user;
- Establishing the user's role in the system; and
- Assigning the user to the POA entity so the user may access the POA's data.

An organization's Chief Executive Officer (CEO)/Executive Director (ED) may serve as a coordinator, or may designate another employee or a third party (e.g., a management agent) for the role. A trusted business partner must designate at least one coordinator if the organization is required to access HUD's secure systems. HUD recommends that each trusted business partner designate two coordinators, for backup purposes. No more than two coordinators may be designated for each trusted business partner.

A CEO/ED may designate a coordinator who has already registered for a "Coordinator" Secure Systems User ID under another trusted business partner by having the designee access HUD's secure systems and request to be a coordinator for an additional trusted business partner. The CEO/ED will receive an "activation key" via U.S. mail. The concept of the "activation key" enables coordinators to use one Secure Connection User ID for multiple trusted business partners under consistent system security procedures. The coordinator is referred to as the Secure Systems Coordinator.

C-2 User Role

A user is a representative of a HUD trusted business partner who submits and/or retrieves program information via HUD's secure systems. If a person registers for a "User" Secure Systems User ID, they will be unable to perform coordinator functions (e.g., control system access). A CEO/ED may designate someone as a user who has already registered for a "User" Secure Systems User ID under another trusted business partner by having the designee request the appropriate system access from that trusted business partner's coordinator.

An individual may be required to perform both coordinator and user functions for an organization. In this instance, the person must register for a "Coordinator" Secure Systems User ID and then assign himself the appropriate system access to complete his user responsibilities.

An individual may be required to perform coordinator functions for one trusted business partner and user functions for another. In this instance, the person must register for a "Coordinator" Secure Systems User ID. The coordinator may use their Secure Systems User ID to perform system administration functions; however, he must request the required system access from the appropriate coordinator to complete his user responsibilities.

D. Logging on to HUD's Secure System

You may access the TASS online system by going to the HUD REAC website at www.hud.gov/offices/reac and clicking the **Online Systems** link on the left side navigation bar. This allows you to log on to HUD's Secure System environment and access TASS. Appendix II provides detailed instructions for logging in to the system.

Note
If a "PATH_NAME" error message is displayed during the TASS log in process, please verify that **upper case character(s)**, and not lower case, are used when entering the User ID.

Appendix III also provides information on the system menu, which identifies the functions available in TASS.

E. Accessing the SS/SSI Reports

The reports that are available to the user on TASS are determined by the POAs that have been assigned to the user by the Secure Systems Coordinator. If you are unable to access a required PHA, Contract, or Project, contact your Secure Systems Coordinator, who is able to grant you the necessary access rights.

E-1 PHA Search Options

A user assigned to a PHA entity may search for and view reports by two criteria: PHA or Household.

By PHA: To search by PHA, the user selects the PHA Name, HUD Program Type, and Re-certification Month from drop-down lists.

The reports are sorted by Program Type, Project Number and Head of Household's SSN.

By Household: To search for a specific Household, the user selects the PHA Name from a drop-down list of all available PHAs and enters the Social Security Number (SSN) of the Head of Household.

E-2 O/A Search Options

A user assigned to an O/A entity may search for and view reports by two criteria: FHA Project Number or FHA Contract Number.

By Project: To search by Project, the user selects one or more Project Numbers and the Re-certification Month from drop-down lists.

The reports in the search results are sorted by Project Number and the Head of Household's SSN.

By Contract: To search by Contract, the user selects one or more Contract Numbers and the Re-certification Month from drop-down lists.

The reports in the search results are sorted by Contract Number and Head of Household's SSN.

By Household: To search for a specific Household, the user selects the Contract Number or Project Number from a drop-down list and enters the Social Security Number (SSN) of the Head of Household.

E-3 Viewing the SS/SSI Reports

The initial search results are displayed as summaries of the individual Benefit History and Income Discrepancy reports on the **Summary Reports** tab. Each household summary has a link to the detailed report. A maximum of 50 summaries are displayed on the screen. Where there are more than 50 household reports in the search results, the screen will have links to the reports in groups of 50 and navigation buttons to allow the user to access the next or previous set of reports. The sort order of the reports is determined by the search criteria (See ***Sections E-1 and E-2*** above.) Users may click the **Detail Reports** tab to view the detailed reports for all households in the result set. The reports are presented in groups of 50. To view the detailed Benefit History or Income Discrepancy report for a specific household, click the **View Details** link on the household's summary.

The search results for the Error and No SS/SSI Benefit Reports also display a maximum of 50 households on each page, and provide navigation links in the event there are more than 50 households within the search results.

After retrieving an individual report or a group of reports, the user may print it or save it to a local computer. Users also may download the entire result set or portions of it to a local computer. The following sections describe how to print reports for an individual household or for all the households in the search results; save the reports being viewed to a local computer;

and, download the data file for a group of reports. For POAs with a large numbers of reports, it may be more efficient to save the reports or download them as a group instead of individually.

F. Printing the SS/SSI Reports

Users may print the Benefit History and Income Discrepancy Reports in Adobe Acrobat's PDF format by clicking the **Print PDF** link on the screen. The user may print an individual household's Benefit History or Income Discrepancy Report or groups of Reports from the set of results. The Benefit History Reports prints each family member of a household on a separate page, while the Income Discrepancy Report prints each household on a separate page. Adobe Acrobat Reader is a free utility that is required for accessing the reports in PDF format. A link for downloading the utility is provided on the left navigation bar of the TASS webpage—under the **Resources** caption.

TASS currently does not support the printing of the Error and No SS/SSI Benefit Reports in PDF format. These reports may be printed using the "Print" command from the browser's File menu.

Note

If you are unable to view the PDF versions of the Benefit History Reports, or you receive an error when attempting to view a PDF report, please use the HTML versions available either through the "Detail Reports" Tab or the "View Details" link. The HTML reports can be printed using the "Print" command from the browser "File" menu, and the browser will automatically add page breaks to the printed report. Both the PDF and HTML reports display the same information.

Viewing and Printing the PDF reports requires Adobe Acrobat versions 5, 6 or 7, which is not compatible with the Windows 98 Operating System. Windows 98 users attempting to view/print/download PDF reports may encounter difficulties or errors, which is a result of this incompatibility and not due to an error in the Adobe Software.

F-1 Printing with HTML Scissors

Some Web browsers do not support the printing of individual tenant reports on separate pages. HTML Scissors is a utility that allows POAs using version 4.x of the Netscape Web browser to print Benefit History Reports with each tenant's report printed on a separate page. The application is not compatible with other versions of Netscape and is not needed for reports viewed and printed using Internet Explorer. Further, the application only works on Windows 3.11, 95 or 98 operating systems.

POAs using the PDF versions of the Benefit History Reports will not need to install and use HTML Scissors.

F-2 Downloading HTML Scissors

The link for downloading HTML Scissors is found under the **Resources** caption of the TASS web page. It is recommended that program administrators download and install HTML Scissors before accessing the SS and SSI monthly reports. **The utility will only have to be downloaded once. Delete the old versions of the HTML Scissors files, if any exist**. The steps for downloading HTML Scissors from the TASS web page are described in Appendix XV.

Note
The HTML-Scissor application is pre-configured for the viewing and splitting of Benefit History reports. Program administrators should not change any settings or configuration options in the application.

G. Saving the SS/SSI Reports

To save the report(s) being viewed to a local computer, the user should choose the "**Save As**" option from the browser's **File** menu. The standard **File Save** dialogue box will be presented. The program administrator will then navigate to the directory where the report is to be saved. Files can be saved with the same name that appears at the prompt or with a user-defined name. Be sure to give the file a meaningful name, e.g., "John Public-10 2003.htm" or "Oct 2003 Benefit History Reports.htm." Users may find it helpful to create the directory that will contain the saved files in advance of downloading reports.

The user can also choose to save the Benefit History and Income Discrepancy Reports as PDF files. In order to save the PDF file that is currently being viewed, choose the **"Save As"** option from the Adobe Acrobat Readers **File** menu.

Note
All program administrators must be aware that once a report is saved to their local diskette or hard drive, it is no longer in HUD's secure environment. They must take precautions to prevent access to the reports by unauthorized individuals.

G-1 Viewing Saved SS and SSI Reports

To view reports that have been saved, program administrators may first launch their Web browser and then choose the "Open" or "Open File in Browser" command from the File menu. The standard file dialogue will enable navigation to the required report file. Otherwise, the user may double-click on the report file. This will launch the default Web browser and open the report.

In order to view PDF files that have been saved, program administrators may first launch Adobe Acrobat Reader and use the File menu to select the desired file to be opened. Alternatively, the user may double-click on the report file, launching Adobe Acrobat Reader.

H. Downloading the Data Files

TASS allows the program administrators to download Benefit History, Income Discrepancy and Error Reports. This is particularly useful for POAs with a large volume of tenant reports or who wish to load the data into another program such as Microsoft Access. The files may be downloaded as ASCII text files or in a compressed (.ZIP) format. The compressed format greatly reduces the size of large files and reduces the download time. Program administrators no longer have to download the results in groups of 50; all the reports in the search results are downloaded at the same time.

The time it takes to download reports will vary with the speed of the program administrator's Internet connection and the number of reports in the result set. Appendix XIII provides steps that a TASS user can use to download data files.

H-1 Field Descriptions for Data Files

The data files that may be downloaded from the TASS online system are in tab-delimited format. That is, a tab character separates each field. Each record is presented on a new-line. The **Data Definition** link under the **Resources** caption of the TASS web page provides the user with a description of the data files for each report type. The link allows the user to access a listing of the name, type, size, and a brief description of each field in the Benefit History and Income Discrepancy reports. The fields are listed in the order they are written to the downloadable files. The data definition information is also presented on the **Data Download** tab.

Appendix XIV provides steps for accessing the data definitions.

I. Distributing the SS/SSI Reports

After the SS and SSI reports become available online, the program administrator should distribute the reports to staff responsible for conducting the re-certification of tenant's income. Failure to distribute the reports in a timely manner to the right staff will prevent effective use of the reports.

Program administrators may use several techniques for distributing the reports:

- Printing and distributing the reports from a central location,
- Permitting multiple users to access the SS and SSI reports online, or
- Providing the reports on a local area network for access by staff responsible for re-certifications.